



Looking at trade policy through a "gender lens"

SUMMARY OF SEVEN COUNTRY CASE STUDIES CONDUCTED BY UNCTAD



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I



Introduction

1. INTRODUCTION

Economic development and social and cultural shifts have led to the decline of many gender-related inequalities across the world. Prominent among them is the rise in female educational enrolment as compared to male enrolment, as well as increases in female life expectancy and labour-force participation (World Bank 2012). However, these shifts cannot be considered an “automatic” outcome of development. Rather, they are the result of rights-based movements for change, concerted policy action, and resource allocation for gender equality. For instance, vibrant women’s movements that demand justice in the areas of gender-based violence, better access to health services, resources and employment, and mainstreaming gender equality in policy-making and national and international institutions have been critical to fomenting these changes. Making gender visible by looking through a “gender lens” has helped to reveal many structural inequalities between men and women in social, economic, and political spheres, and then to take steps to redress those inequalities. However, just looking through a “gender lens” may not be sufficient. To achieve more equitable outcomes, it may prove necessary to go beyond gender issues alone and identify the disadvantages women face due to their race, caste, ethnicity, religion, and class.

As of today, women as a group continue to be paid as much as 30 per cent less than men in some countries. Some 600 million working women, representing 53 per cent of the total number of working women, are engaged in vulnerable jobs in self-employment, domestic work, and unpaid work on family farms and enterprises that are not protected by labour laws (UN Women 2012). Persistent segmentation by gender in economic activity, unequal burdens of care work and household responsibility, unequal access to resources, and higher relative mortality of girls and women (World Bank 2012) are among both the causes and results of social and economic disparities between men and women. As the World Bank (2012) points out, gender disparities endure in these “sticky” domains because of institutional or policy deficits, constraints in multiple areas that reinforce each other, or persistent gender roles and social norms that prescribe and influence behaviour. The economic empowerment of women, in particular, is an area in which more progress needs to be made, a point that

has been highlighted in the debates around the post-2015 Millennium Development Goals agenda.

The international environment within which economic and trade policies are shaped has also changed dramatically in recent years. The 2008 financial crisis that sparked the “Great Recession” has signalled structural shifts in the global economy. Although world trade quickly recovered from the effects of the crisis, it grew at only a modest rate of about 2 per cent annually between 2011 and 2013, as compared to more than 5 per cent annually in the pre-crisis period. This is due to the combination of sluggish import demand in many countries and lower commodity prices. Developing-country growth rates have generally surpassed those of developed countries for both goods and services (UNCTAD 2014a). As pointed out in UNCTAD’s Trade and Development Report (UNCTAD 2013b), the burden of re-balancing the global economy has fallen on developing countries that were previously highly dependent on export demand. Promoting growth in these developing countries will now have to include a strong domestic demand component, as pursuing a solely export-led growth model may no longer be sufficient. How does this affect gender inequality in developing countries, considering that women have been crowded into the lower rung of export-related manufacturing activities? What will be the gender impact of greater South-South trade? The questions that will need to be asked in a new international environment will likely be different than in the past, and they will have to consider the gender dimension of shifts in trade policy.

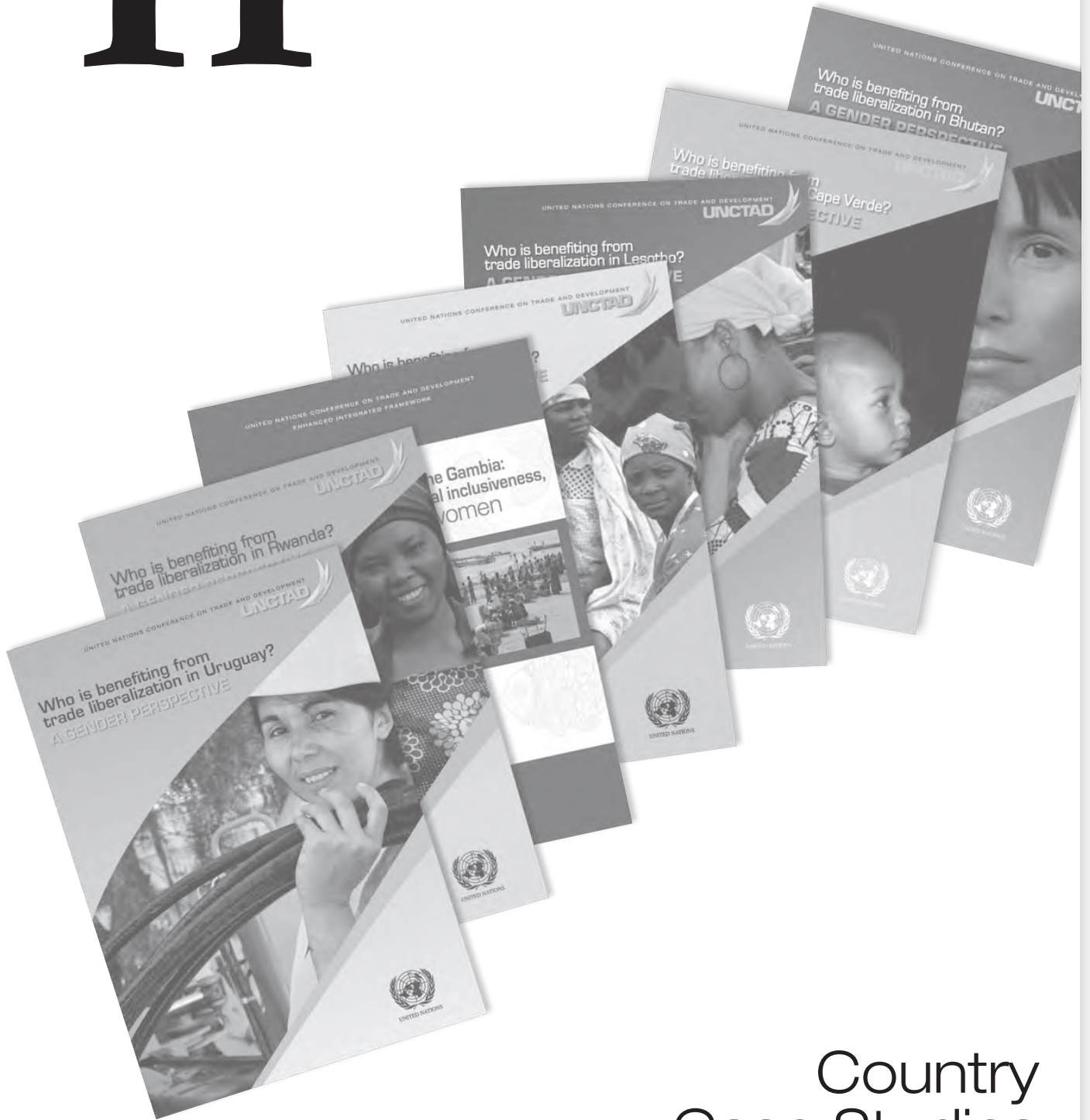
Through its country case studies on the impact of trade liberalization and facilitation on gender equality and women’s well-being, UNCTAD has tried to clarify the gender-differentiated outcomes of trade policy. It has also attempted to draw larger lessons for policymaking. Using a variety of methodologies, including qualitative and quantitative methodologies as well as both multisectoral and sectoral approaches, UNCTAD’s country studies contribute to the still-limited literature on the impact of trade policy on gender outcomes such as employment, income, empowerment, and intra-household relationships. The case studies also highlight the ways in which a gender perspective can contribute to a deeper and richer understanding of trade policy and performance, namely by challenging the mainly aggregate focus of conventional trade policy analysis that overshadows the redistributive effects of trade at

the country level; bringing to the forefront of the analysis intersecting patterns of inequality (e.g. sex, income, race, and spatial location); and integrating social and cultural factors into economic analysis (UNCTAD 2012a).

This paper presents summaries of the seven country case studies undertaken by UNCTAD during the period 2010-2014. The studies are part of UNCTAD's activities on trade, gender, and development carried out by the

organization in accordance with its mandate. Four studies (Bhutan, Cape Verde, Rwanda, and Uruguay) were financed by the seventh tranche of the United Nations Development Account. Two studies (Angola and Lesotho) were financed by the Government of Norway. The study of the Gambia was developed within the framework of the Diagnostic Trade Integration Study (DTIS) Update, carried out under the Enhanced Integrated Framework (EIF).

II



Country Case Studies

2. COUNTRY CASE STUDIES

2.1 RWANDA

Rwanda is engaged in the difficult task of rebuilding its society after the 1994 genocide that devastated both the social and economic fabric. Rwanda is categorized as a least-developed country (LDC), but it achieved a remarkable average growth rate of 8 per cent over the previous decade. However, Rwanda continues to run a negative trade balance mostly financed by inflows of official development assistance. In 2010, services made up the largest share of its GDP followed by agriculture and industry.

Rwanda has been very successful in mainstreaming gender concerns in policy and in closing the gender gap in education and political participation. However, work remains to be done, particularly with regard to access to economic assets and resources, especially for rural women. Also, gender-based cultural norms to some extent limit the reach and impact of “equalizing” legislation.

UNCTAD (2014b) examines the gender impact of trade liberalization and/or expansion in Rwanda by looking at the direct effect of exports on employment, as well as the effect of imports on female welfare (consumption effect) and government spending (revenue effect). The study correlates indices of export and import orientation of different sectors with the female share of employment in them and uses this to analyse and predict the likely impact of export expansion on the gender composition of employment.

The agricultural sector in Rwanda is mainly subsistence-oriented. Women tend to be crowded in agriculture (81.6 percent) and largely insulated both from the direct benefits and the potential threats from trade, though the picture is more nuanced if one zooms in on discrete agricultural subsectors. For instance, traditional cash crop sectors such as coffee and tea account for the bulk of exports in Rwanda and are extremely export-oriented; they are the largest employers for women among the tradable segments. Rwanda is repositioning itself in the high-quality tea and coffee export segment and this could have different effects on the female workforce. On the one hand, it could favour commercially oriented farmers and crowd out small and marginal farmers who tend

to be women. On the other hand, the sale of high-end products could create openings for women to sell premium-quality products directly to specialty off-takers in Western markets if they are provided with supportive infrastructure and appropriate marketing networks.

Non-traditional cash crops (e.g. floriculture) offer significant employment opportunities for many low-income women, though questions arise as to the quality of the work generated (in terms of wages, stability, skill development, and exposure to hazards) and the associated socio-economic costs. Domestic-oriented staple food production is currently being modernized, though rural women tend to be relatively disadvantaged compared to men in terms of capabilities and access to productive resources, and this can significantly hinder their ability to integrate efficiently into upgraded supply chains. Overall, the commercialization and diversification of agriculture – in parallel with trade integration – presents both challenges and opportunities for women.

Industry (manufacturing, mining, and utilities) tends to be relatively export-oriented, but this is mainly due to mining industry exports. Mining also remains highly male-intensive and employs only 0.02 per cent of all economically active women. Thus, revenues from external trade in industry do not particularly affect women. However, women are active in a number of export-oriented manufacturing sectors such as agro-processing and handicrafts that can emerge as significant growth drivers and contribute to alleviating poverty and empowering women.

Services engage 17 per cent of the female workforce, though most services sectors in Rwanda remain non-tradable. Tourism is an exception as well as a female-intensive industry with a little over half of all employees being women (55.3 per cent). Expansion of tourism-related services would create more jobs for women, though its aggregate impact would likely be small, as the sector currently employs only 0.2 per cent of economically active women.

In terms of consumption, because most economically active Rwandan women are rural subsistence farmers, they are relatively insulated from fluctuations in food prices due to trade liberalization. Outside the capital of Kigali, 50 per cent of total household income is the result of in-kind consumption or goods produced

within the household, and the share of the same for poorer households is higher.

Liberalization of the tariff regime within the East African Community (EAC) led to sharp declines in tariff revenue for the central government, though this was more than offset by the increase in direct and indirect taxes as well as net grants. Thus public spending has not fallen over time and the likely negative effects on female labour and time have been averted.

2.2 ANGOLA

Riven by conflict until 2002 and a victim of Dutch disease as a result of large oil, gas, and diamond exports, Angola has not yet been able to undertake a process of long-term structural transformation that would re-align the economy towards more productive activities. This is despite an impressive average annual GDP growth rate of 12 per cent during the last decade and significant economic reforms implemented since the early 2000s aimed at achieving macroeconomic stabilization, restructuring, and diversification of the economy.

Macroeconomic distortions in the form of a highly appreciated exchange rate continue to make manufacturing exports uncompetitive, and the country's output-employment structure remains skewed. As in many LDCs, agriculture in Angola remains a low-productivity sector that accounts for 82 per cent of all employment but only 8 per cent of GDP. Thus the economy has a large segment of informal economic activity that contributes over 45 per cent of GDP and provides 70 per cent of employment in rural and urban areas. UNCTAD (2013a) uses a quantitative approach to assess whether the existing structure of the economy has created jobs for women and whether this has led to a greater feminization of the workforce. By illuminating the effect of structural economic issues on gender inequality, the study also challenges the notion that macroeconomic policy is gender-neutral.

Trade liberalization in agriculture has already increased food imports in Angola. Import penetration of food products in the country is estimated to be around 70 per cent. It might be expected that cheaper imports would depress the prices

of domestic produce (especially given the high exchange rate) and/or cause a shift in consumption from domestic to imported staples, thus affecting the livelihood of rural and mostly female cultivators. However, agriculture in Angola is still growing at a fast pace, and although farmers who produce cash crops for the market might have been affected, female farmers are mostly subsistence-oriented and remain insulated from trade flows. Thus trade liberalization has not had much of an effect on the welfare of female agricultural producers. As infrastructure is upgraded, however, the national market will be more integrated, exposing domestic agriculture to the full effects of competition from cheap imported goods. This will eventually have a significant impact on the female workforce. Promoting a switch from the production of low-value-added staple crops to higher-value-added commodities is a positive policy step, though it risks placing women at a disadvantage because they are already crowded in the subsistence sector and may be marginalized, excluded, or displaced in the process. The domestic staples segment itself needs to be commercialized by providing women access to extension services and improved production techniques, land, credit, and training in business management.

Although, manufacturing has experienced double-digit growth, the contribution of manufacturing to GDP in Angola has not increased over time. Export-oriented activities have not advanced because of the appreciation of the exchange rate, which makes exports economically unviable. Thus Angola has not experienced a "feminization" of manufacturing. However, the potential exists for reactivating Angola's manufacturing capacity in subsectors with possible comparative advantage. High-value-added and processed food products might be an industry within manufacturing that could offer women significant employment opportunities, though the issues of an uncompetitive exchange rate and institutional barriers will need to be addressed. In terms of services, tourism-related activities could be promoted to diversify the economy, although, again, currency appreciation and lack of skilled personnel could pose challenges. Tourism also has the potential to employ a large number of women, especially if gender gaps in education and vocational training are bridged.

2.3 LESOTHO

Economic growth in Lesotho has been slow and uneven. The country is classified as a LDC and as a food-deficit nation. Although a relative contraction in agriculture has been more than offset by the expansion of industry, 52 per cent of the male workforce and 27 per cent of women are engaged in subsistence agriculture. In contrast with Rwanda and Angola, however, Lesotho has experienced a significant structural transformation from agriculture to manufacturing due to trade-related concessions that have provided women with better employment opportunities. UNCTAD (2012b) uses quantitative and qualitative data to analyse this shift and its impact on women’s employment, income, and working conditions. The study notes that, despite progress, vulnerabilities remain with respect to the withdrawal of trade concessions and poor wages and working conditions.

Lesotho’s structural transformation from agriculture to manufacturing has been driven by an expansion of the apparel industry as a result of unilateral, non-reciprocal, duty-free, and quota-free access to the U.S. market under the African Growth and Opportunity Act (AGOA). The country became eligible for access in 2001. The agreement’s special rules of origin that allow for the use of inputs from third parties have facilitated a particularly rapid expansion of exports to the United States. Between 2001 and 2004, apparel exports from Lesotho to the United States nearly tripled.

As in many other developing countries that export apparel, the workforce in Lesotho’s apparel industry is highly feminized, with up to 98 per cent of female workers in certain segments (such as cutting and sewing). The expansion of the apparel industry has provided employment and income-earning opportunities for relatively unskilled women who had few chances of obtaining formal employment otherwise. From 1999 to 2004, Lesotho’s apparel industry grew to be the country’s single largest employer, increasing from only about 10,000 jobs in 1999 to some 48,000 jobs in 2004. Most workers are employed on a permanent, full-time basis rather than as casual workers, and collective bargaining agreements are in place for them. The industry has also introduced an innovative health programme in co-operation with the Government that provides free HIV-related care and treatment at the workplace. Given that nearly 40 per cent of workers

in the textile and apparel sector are HIV positive, having access to free care means that workers avoid long waiting times in public clinics and potentially lost earnings.

However, UNCTAD (2012b) finds that even as this export expansion has created opportunities for women, it has also created new patterns of vulnerability and inequality. Although wages in the industry are in line with the minimum statutory wage, they are low in real terms and barely sufficient to cover basic living expenses such as food and housing, and thus do not enable workers to save or improve their standard of living. In fact, wages in the textile and apparel industry are the lowest among all industries in Lesotho and contribute significantly to the persistence of the gender wage gap at the national level. Even though core labour standards such as no child labour, forced labour, or sweatshop conditions are respected, working conditions are described in the UNCTAD study as harsh.

In terms of occupations, women tend to be crowded in the low-wage and unskilled nodes of the apparel chain such as packing, sewing, and cutting, thus limiting opportunities for them to develop their skills and advance in their jobs. Such occupational segmentation seems to be the result of gender norms and stereotypes about which activities are appropriate for women, rather than lack of ability or differences in skill endowments. In addition, the dilution of preference to Lesotho due to preferential treatment granted to other countries, as well as the expiration of preference due to the phase-out of AGOA scheduled for 2015, may see Lesotho lose its present advantages as an exporter. This would endanger the gains that have been made with respect to women’s employment. Thus, a case can be made for the extension of the AGOA on gender grounds.

2.4 THE GAMBIA

One of the smallest countries on the African continent, the Gambia has a poverty rate of over 48 per cent and a high degree of inequality. It is also classified as a LDC, though its economy has shown some dynamism over the past decade. In terms of structure, services make up more than 50 per cent of GDP and are driven by tourism, while the country’s main export is peanuts. The Gambia also has a rich resource base in marine fish species along its coastline as well as inland through the Gambia river system, which runs the

entire length of the country. The fisheries industry is already important for the livelihoods and food security of the poor: fishing, processing, and trading are the main source of livelihood of coastal communities and are also complementary activities that serve as a safety net for rural communities inland. A study on the Gambia by UNCTAD and EIF (2014) uses a sectoral approach to examine the fisheries sector as a potential vehicle for poverty alleviation, given the country's resource base in marine life. Using both a quantitative and qualitative approach, the study provides an overview of the existing structure of the fisheries sector, including its gender dynamics, and examines the constraints and potential associated with expansion of industrial processing of fish as well as aquaculture and the artisanal subsectors.

Fishing-related activities are quite feminized. Women play an active role in the artisanal sector, constituting 80 per cent of processors and 50 per cent of traders of fresh and cured fish products. They also make up 70 per cent of workers in the industrial subsector. Women are segmented into particular activities in the industry. In the artisanal segment, gender-based trade patterns exist throughout the chain and are evident in two inter-related areas (Musselli and Zarrilli 2012):

- (i) Women operate on a small scale that involves direct marketing of fish and low profit margins, while male traders operate on a larger scale with more capital-intensive techniques and higher profit margins.
- (ii) Women serve domestic and inland urban markets while men mainly control more distant, subregional, and export markets, including the United States and European Union. Likewise, patterns of job segregation exist in the industrial segment, where women are crowded in packaging and processing nodes.

In the artisanal segment, this division of labour is the result not only of deeply gendered social roles that identify women with the household and restrict their mobility, but also of unequal access to productive resources in the fish value chain. Women have much less access to community-managed facilities such as landing sites and smoking and drying facilities. In fact, women generally have access only to what can be described as "diminished assets," whereas subsectors that receive greater investment tend to "defeminize," that is, reduce the number of women involved. Thus

women generally use rudimentary technologies to salt and dry fish, and have little access to credit or training in fish processing or business skills.

Though the local export-oriented industrial fish-processing sector is relatively small, it has significant potential to generate employment and alleviate poverty, particularly for women, in the downstream node (factory processing). Women currently account for a range between 46 and 80 percent of the workforces at fish factories. The sector is still in an embryonic state: as of July 2012, a total of 128 women were employed in the four operating factories. An expansion of the sector is likely to stimulate an increase in female wage employment in the formal sector, with important corollary poverty alleviation effects (women pay school fees for their children and buy clothes and food for the family from their wages).

However, attempts to dynamise the fisheries industry, particularly the export segment, may also exacerbate existing patterns of gender segmentation, polarization, and exclusion. In particular, the selective upgrading and segregation of the export-oriented segment of the chain may accentuate social cleavages between large-scale male traders (involved in the export segment) and small-scale women dealers (predominant in local marketing). Also, for those fish species that serve both the export and domestic markets, there may be some diversion of supplies from the domestic to the export chain, with important food security implications. Policies need to be carefully structured to yield socially inclusive and gender-equalizing results.

2.5 CAPE VERDE

The Republic of Cape Verde is a small archipelagic country consisting of 10 islands off the coast of Senegal in Western Africa. The country graduated from LDC status in 2008. It has a service-based economy with over 66 per cent of GDP coming from tertiary activities, and its tourism industry appears poised for growth. Cape Verde's economy is heavily dependent on imports, especially food products and several kinds of machinery. The export sector is small and limited to primary and low-technology-intensive goods. Food insecurity in Cape Verde is structural, as only 10 per cent of land is arable and the country is thus greatly exposed to external food price shocks. The UNCTAD (2011a) study on Cape Verde uses a

micro-simulation approach to assess the impact of trade liberalization and facilitation on household welfare through income, consumption, and revenue effects. Using household survey data, the study examines the welfare implications of three potential developments in the country: an increase in the price of food, higher remittances, and expansion of tourism. Most importantly, the study asks whether there would be a gender bias in gains from trade and how they might affect poor and rich households differently.

UNCTAD’s study simulates the poverty impact of a 10 per cent rise in international food prices on household budgets in Cape Verde. Nationally, the food budget share is approximately 45 per cent among households with the lowest income, with a small difference between female- and male-headed households. As poorer households spend a larger share of their income on food than rich households, higher food prices have a significant anti-poor bias in urban and rural areas as well as in male- and female-headed households. Similarly, assuming that tariff liberalization in agriculture would lead to a 10 per cent decline in food prices, simulating that impact caused poverty to decline by 2.6 percentage points, revealing again that lower food prices have a remarkable pro-poor bias.

Remittances are an important source of household income in Cape Verde, accounting for over 10 per cent of the total. An increase of 20 per cent in remittances would lead to positive welfare effects across the board. Income gains would be higher for female-headed households, and rural areas would be more affected than urban areas. In urban areas, the gains would be similar across the entire range of income levels, equivalent to 2 per cent of household income for female-headed households and 1 per cent for male-headed households. In contrast, the gains in rural areas would tend to be positively associated with per capita household expenditure, especially for female-headed households. Overall, these effects would be most important for female-headed households and for those living in rural areas, with the exception of the poorest households, whose share of remittance income tends to be low.

Tourism is presently one of the main sources of growth and foreign exchange earnings in Cape Verde and remains an important industry for the analysis of welfare gains and poverty impacts. Since the major sectors associated with tourism are the hotel and

restaurant sector and the commerce and transport sector, UNCTAD (2011a) assumes that per capita expenditure of the household increases by 30 per cent if the head of the household works in the former sector and 10 per cent if the head works in the latter. The analysis reveals that expansion of the tourism industry would lead to minimal welfare gains for the poorest households. Growth in the communication and transport subsectors would benefit richer and middle-income households disproportionately. In both rural and urban areas, female-headed households and those at the lower end of the income distribution would benefit more from an expansion of the commerce subsector than from expansion of hotels and restaurants. Male-headed households would benefit from the expansion of transport, and more so in urban areas.

As in the case of the other countries analyzed in this report, the participation of women in tourism education and training in Cape Verde would enable them to access higher-level, more stable, and better-paid positions.

2.6 BHUTAN

Bhutan is a small landlocked LDC in the Himalayas that has achieved a level of human development status classified as medium. The country has seen sustained growth since the 2000s, driven mostly by hydropower development, though agriculture remains the main source of livelihood. The Bhutanese economy is characterized by a fair degree of trade openness, and the UNCTAD (2011b) study was intended to broadly cover aspects of trade facilitation in such areas as customs procedures, transport, and compliance with standards. The analysis also assessed the gender impact of a reduction in most-favoured nation (MFN), or non-preferential, tariff rates, which are relatively high in Bhutan.

The UNCTAD (2011b) study assessed how these trade policies have affected Bhutanese households through changes in the prices of goods and factors of production via consumption and income effects, as well as through shifts in government revenues. Results were then aggregated by the relevant dimension – region, gender, poor or non-poor – so as to identify subgroups that would gain or lose from trade policy. The analysis focused on key agricultural products for

which the effects of trade were potentially sizable and quantifiable: on the export side, potatoes, oranges, and apples (temperate commodities in which Bhutan has a comparative advantage within South Asia); and on the import side, rice, the country's staple food.

As regards exports, the study found that trade liberalization/facilitation would have a progressive or pro-poor impact (i.e. it would favour poor households more than rich ones) in the case of potatoes and oranges because these producers tend to be relatively poorer than non-producers. On the other hand, since apple producers were found to be better off than non-producers, an expansion of apple exports would likely benefit non-poor households relatively more than poor households (a regressive or anti-poor bias). Since the labour requirements, costs, and risks associated with apple production are high, especially if conducted on a large scale for export purposes, only the richest farmers may be able to specialize in apple production. Moreover, there will most likely be a tendency for buyers to source from large-scale growers that are easier to coordinate and monitor.

To promote equitable outcomes, strategies to boost the agricultural sector must therefore include instruments for redistributive policies and address the specific difficulties that poorer farmers face in reaping commercial opportunities.

On the import side, the analysis found that further liberalization of rice imports would have a progressive pro-poor bias as far as net consumers are concerned, since the share spent on rice declines sharply as household income rises. A major drawback of this analysis was that it did not document the effects on net producers of rice, which is important because 75 per cent of farming households are engaged in rice production.

As regards gender, the principal conclusion that emerged from UNCTAD (2011b) was that there would be little or no gender bias in the gains from trade in either of the export or import sectors considered. In terms of consumption expenditure, in both rural and urban areas female-headed households were found to be relatively better off than male-headed households. Also, there was no discernible discrimination against women with regard to the ownership of productive assets. More than 60

per cent of land title registration deeds are held by women, following a traditional pattern of matrilineal inheritance in most communities.

The study also found that textiles, garments, handicrafts, and agro-processing have the potential to become dynamic sectors in Bhutan if the right conditions are met and links with tourist outlets and off-takers in global supply chains are established. Only 4.7 per cent of the Bhutanese workforce is employed in manufacturing, and at first glance it appears that trade liberalization or facilitation would have a minimal impact on that sector. However, the textile industry accounts for around 86 per cent of the women employed in the sector, and thus expansion could lead to direct benefits for women. The case is similar for tourism, and the processing of food products also has considerable potential to develop further. For example, Bhutan could capitalize on its distinctive path of development – the country measures prosperity through formal principles of spiritual, physical, social, and environmental health that it calls “gross national happiness” – by positioning its goods and services in high-value markets.

2.7 URUGUAY

Uruguay is an outlier in this sample of country studies because it is an upper-middle-income country with a fairly equal distribution of income that ranks high on the human development index. Uruguay also has an economic structure that is more typical of rich countries than developing countries, and it is not a labour-abundant country. Uruguay is an exemplar in terms of gender equality in the areas of education and health, and it fares rather well in economic participation and opportunity for both men and women. However, work remains to be done in ensuring greater political empowerment of women. The UNCTAD (2014c) study examines how trade liberalization and related shifts in the Uruguay's productive structure have affected women's access to employment.

Uruguay has experienced a profound transformation in its productive structure and trade patterns. Its specialization in primary commodities, mainly agricultural and husbandry goods, has deepened since 1990. By 2012, around 65 per cent of its total exports were primary commodities, a significant

increase from 40 per cent in the early 1990s. This is the result of several factors, including implementation of a stabilization policy based on management of the exchange rate; setting up of an industrial policy aimed at developing niches of specialization in exports to compensate for the small size of the domestic market; unilateral trade liberalization; regional integration through the Southern Cone Common Market (MERCOSUR); phasing out at the multilateral level of the special trade regime for textiles and clothing; and high international prices for agricultural commodities.

The services sector has traditionally been Uruguay's leading sector in terms of its contribution to the national economy, accounting in 2011 for over 70 per cent of GDP. Another aspect of the country's structural transformation is the sharp decline in the contribution of manufacturing to total value added. Uruguay has experienced a de-industrialization process in which the contribution of manufacturing declined from 23 per cent in 1978 to only 15 per cent in 2011 in constant terms, accompanied by a decline in employment in the sector as well.

Overall, data seem to suggest that the trade implications of the structural composition of the Uruguayan economy have been rather unfavourable to women. The expansion of the agricultural sector did not translate into more employment opportunities for women, and the growth of the services sector did not sufficiently increase women's access to higher-level and better-paid jobs.

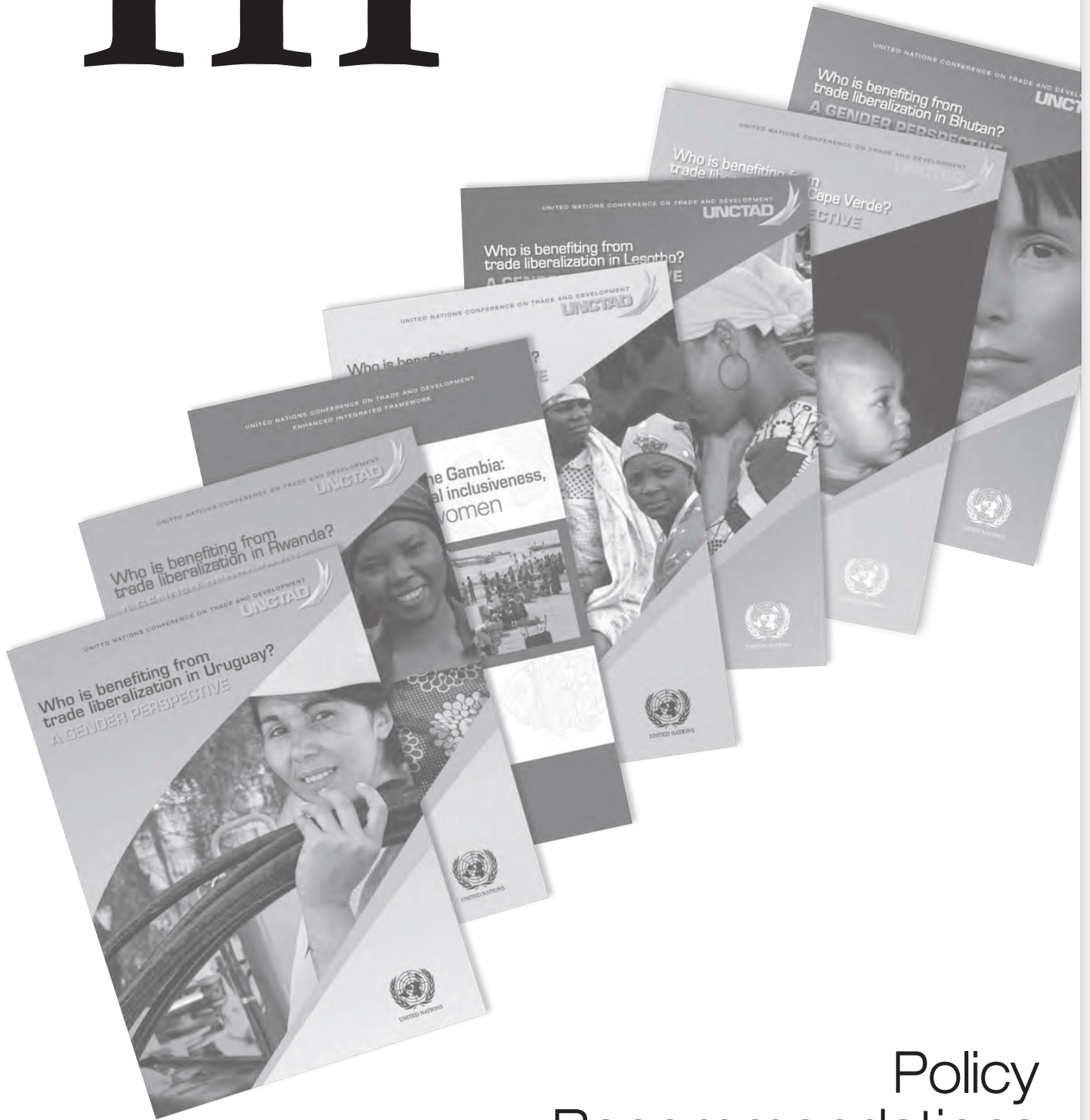
Trade policy and the deregulation of domestic markets have consolidated the extensive export-oriented character of Uruguayan agriculture, unleashing some trends that have affected the rural female workforce. However, looking at the number of women employed in agriculture, it appears that Uruguay has not been fully able to relocate women into newly created agricultural activities, although

employment opportunities for women have emerged in the horticulture and food processing subsectors. Moreover, as extensive agriculture is male-intensive, productivity improvement in extensive agriculture has mainly benefited the male workforce.

Research shows that trade integration has had a significant negative impact on employment in manufacturing and played a role in reducing relative wages and wage dispersion within the sector, with the main losers being non-skilled workers. Sectorally, employment in textiles, garments, and leather, which are female-intensive sectors, experienced a sharp contraction of employment. However, the food processing industry, in which many subsectors are also female-intensive, created some new jobs. The loss of jobs in the manufacturing sector was partially offset by the expansion of the services sector brought about by Uruguay's increased trade openness. Labour demand increased in those sectors that mostly employed women, including tradables (e.g. tourism and information and communication services) and non-tradables (e.g. social and personal services). Women's employment distribution through the different subsectors has not substantially changed over the years: they are mostly employed in wholesale and retail trade, hotels and restaurants, and, above all, in social services, including education, health, and domestic services. In fact, the female share of employment in financial services has dropped over time, perhaps due to increasing concentration in the industry in which women were disproportionately the losers.

The UNCTAD (2014c) study suggests that Uruguay implement measures focused on enhancing women's participation in the expanding agricultural sectors, such as better access to productive resources, as well as on increasing women's access to qualified positions in the services sector through a better understanding of the skills and expertise required.

III



Policy
Recommendations

3. POLICY RECOMMENDATIONS

In all its country studies, UNCTAD has offered specific policy advice with respect to how the impact of economic and trade policy can be made both gender-sensitive and gender-redistributive. This section discusses some of these policy recommendations with respect to different sectors.

3.1 AGRICULTURE AND FISHERIES

A number of countries that were studied, such as Bhutan, have primarily agricultural-based economies and are focused on low-productivity subsistence farming and reliant on just a few export cash crops. However, in countries where output has shifted to the tertiary or secondary sector, as in the case of Lesotho, Angola and Rwanda, a large share of the population and especially women continue to make a livelihood from the agricultural sector. These countries then face a policy choice about whether to build a production regime based on knowledge-intensive, sustainable smallholder agriculture or to commercialize agriculture on a large scale. From a policy and gender perspective, it appears that parallel efforts on both fronts will be necessary.

First, smallholder production needs to become more viable and agricultural productivity has to be enhanced with a special focus on providing women cultivators with extension services and access to improved production techniques, credit, better inputs, and irrigation infrastructure. Better transport, storage, and logistical facilities would ensure that perishable produce reaches the market safely. The production of domestic staples and indigenous non-traded crops could be modernized and commercialized for local markets in countries such as Cape Verde, Rwanda, and Angola. In addition, high-value niches within the traditional sector should be identified for export development. In Bhutan, for example, the collection and sale of mushrooms, medicinal plants and plants for the extraction of essential oils could be considered. These niche sectors in agriculture could provide employment for women and build upon their traditional knowledge.

Land tenure issues also need to be addressed in contexts where customary laws, which often discriminate against women, override statutory laws on inheritance and land ownership. Under the

prevailing customary practice in Angola, for example, women’s right to own land and access economic resources may depend on their marital status and reproductive capacity. This implies that, in some regions, a woman who cannot have children, who is divorced, or who has become a widow may lose her right to land ownership. This is one of the most serious obstacles to increasing the agricultural productivity and income of rural women. Governments may want to seriously consider the need to secure women’s user rights to communal property.

Second, gender-specific constraints relating to the commercial production of staple and cash crops need to be tackled simultaneously. Existing patterns of gender segmentation could worsen if women remain segmented in the less dynamic or contracting non-tradable sectors and men continue to predominate in the tradable and expanding sectors. In countries such as Uruguay, where agriculture is largely commercialized but does not provide many avenues for women, consideration might be given to new export crops in horticulture, milk production, and flower exports that involve women in production activities. Similarly, in the Gambia, commercial production in niche markets in oysters and shrimps could be designed to benefit women. Specifically, there is a potentially important niche export market for smoked catfish and other high-value fish species including shrimps and barracuda to the Gambian diaspora in Europe. Efforts need to be made to integrate women cultivators into global supply chains and connect them with off-takers in developed countries (buyers and local processing factories) that may in many cases provide extension support, quality inputs, and finance. In order to avoid relationships of dependency or highly unequal contractual terms, it may be advisable to consider triangular public-private partnerships involving farmers, off-takers, and the public sector.

In terms of trade policy, a number of Aid for Trade initiatives, including the Enhanced Integrated Framework, could be used to catalyse development assistance in support of countries’ efforts to develop the basic economic infrastructure and support services needed to upgrade and expand sectors in which women work. Where specific gender issues arise, it will be important to incorporate them in the design and implementation of the support scheme. The elimination or simplification of non-tariff measures

such as sanitary and phytosanitary measures, and the reduction of transport and other related trade costs, could also be discussed in the framework of enhanced regional cooperation. At the international level, more emphasis needs to be placed on the supply-side aspects of trade facilitation, and in particular on gender-specific supply-side obstacles that hinder women's entrepreneurial potential. Similarly, as suggested by the study of Angola, countries in the LDC category could take advantage of the leeway they are afforded under World Trade Organization rules and use measures such as agricultural subsidies and temporary tariff protection to offset competitive disadvantages and restore supply capacity in agriculture.

At the same time, questions of food security and equitable development with respect to agriculture also need to be kept in mind. At the household level, it is important to preserve some capacity to produce staple foods for self-consumption as a way to mitigate food price risks. For instance, Cape Verde is highly dependent on food imports, and UNCTAD's study shows how a rise in international food prices could have deleterious effects on the poorest households. The Government already administers social protection mechanisms to control the negative incidence of food insecurity, but these programmes could be fine-tuned by location, gender, and income. Focused cash transfers as an alternative strategy may also be considered. Angola could raise some tariffs on agricultural products of export interest (e.g. cereals), at least in the short to medium term, though the potential anti-poor bias of this measure needs to be addressed through the use of safety net measures for vulnerable segments of the population. Negotiating tariff bindings to ensure food security is also important, as tariff headroom will leave the country with a considerable amount of flexibility when designing domestic protection schemes aimed at empowering rural women and promoting the security of livelihoods and rural development. Countries that wish to stimulate local staple food production, in particular, may want to keep the flexibility to adjust tariffs within their bound ceilings, especially with respect to very sensitive products in terms of gender and food security. It is important to keep in mind, however, that, on aggregate, tariff protection policies may yield pro-poor results if the rural poor outnumber the urban poor (who tend to be heavily reliant on imported foodstuffs), and to the extent that

peasant farmers produce a surplus that is sold on domestic markets. Political considerations also have to be kept in mind, as policymakers may be reluctant to raise tariffs that adversely impact politically sensitive urban constituencies.

A related sector with respect to agriculture is fisheries, which has considerable potential for further development in Angola, Cape Verde, and, particularly, the Gambia. In the latter, it is important to acknowledge and address gender-based constraints throughout the planning, implementation, and monitoring of projects aimed at repairing and expanding facilities at fisheries landing sites and fish domestic markets. The objective is to ensure that facilities used by women are upgraded, or that upgraded facilities (including those that serve the export-oriented segment of the chain) can be effectively accessed by women as well as men. Prioritized investment should include facilities that cater to small-scale operators (women) who serve the domestic market, and not only facilities designated for export. Strategic domestic-oriented facilities would include ice plant and cold storage facilities to market high-quality fish products at main urban/inland markets, and fish handling and processing equipment.

3.2 MANUFACTURING

The countries examined in this study face a variety of challenges with respect to the manufacturing sector. In some countries such as Rwanda and Angola, appropriate macroeconomic and industrial policies need to be adopted to trigger a process of structural transformation, while in Lesotho growth in manufacturing needs to be consolidated, diversified, and sustained. In Uruguay, since deindustrialization is already under way, import competition needs to be tackled through product and market diversification, while avenues to boost MERCOSUR manufacturing exports could also be explored.

From a gender perspective, when focusing on women as entrepreneurs, due attention needs to be paid to small and microenterprises that are often informal and artisanal. For instance, there is a vibrant microentrepreneurial sector in Rwanda that has significant potential to help alleviate poverty and empower women. If anchored in rural production, investment in these microentrepreneurial endeavours

is a way to offer off-farm activities to rural women. Because women entrepreneurs often lack access to capital, credit, market networks, and technological know-how, these areas could become the focus of policies to improve productivity and earnings. Public services and investment in adequate physical infrastructure and facilities could also play a key role in unleashing the dynamic potential of small and micro enterprises. It will also be important to create and strengthen women’s associations and co-operatives to help them access wider markets and increase their bargaining power vis-à-vis downstream actors such as wholesalers, transporters/carriers, and other medium- to large-scale traders, all of whom tend to be men.

In terms of creating more wage employment in the manufacturing sector and diversifying the export base, there is a need to promote particular industries that have potential comparative advantages, such as petroleum-based products, petrochemical, and agro-processing in Angola, and the dairy industry in Uruguay. The production of differentiated, high-value, and processed food products in particular seems to offer significant opportunities for formal employment for relatively unskilled women. In Lesotho, the UNCTAD study found potential for beverages, footwear, milling products, light electronic assembly, and oils. In addition, creating forward and backward linkages with existing industries and developing industrial clusters could generate a new dynamism in manufacturing. In Lesotho, developing industrial clusters and linkages could offer new employment opportunities for two discrete groups of workers: workers in the textile and apparel sector (mainly women), and retrenched migrant miners (men). The Government could also support the creation of a textile cluster, where raw materials and trims are locally produced. This could be done through public-private partnerships, although due attention needs to be given to sustainability aspects.

In Lesotho, short-term responses could be geared to a temporary extension of AGOA tariff preferences and the third-country fabric clause. This would give Lesotho more time to design and implement a post-AGOA adjustment strategy. Negotiators may wish, in particular, to build a “gender case” for extension of the preferential regime on humanitarian grounds. Also, initiatives to tackle HIV/AIDS in the workplace could be leveraged to build a product-differentiation

strategy and penetrate new export markets, with gender as an integral component of this approach.

Trade liberalization is likely to affect the prospect of industrialization in Cape Verde, since local producers increasingly face direct competition from EU producers. The food processing, footwear, and clothing sectors that traditionally rely on a large female workforce may be particularly affected. It is crucial in this regard that Cape Verde use all the flexibility available within the Economic Partnership Agreement (EPA) recently finalized with the European Union in defining product coverage, sequencing, and the transitional period for liberalization. The country should include certain safeguards to protect its sensitive agricultural and non-agricultural products, and also consider women’s participation in production.

In Bhutan, establishing intellectual property protection for traditional textile designs could give a boost to the textile handicraft industry. By capitalizing on its image, Bhutan could gain brand identification and strategically position itself in high-value markets. This could be done by implementing a strategy based on geographical indication or even trademark protection through strategic alliances between producer associations built around appellation areas and large off-takers (e.g. traders, specialized wholesalers, and retailers).

Finally, in terms of improving women’s wages, working conditions, and access to higher-skilled jobs, it will be important to establish women’s labour associations and unions in the manufacturing sector. Women must be integrated into new and expanding industries through on-the-job training programs and by incentivizing firms to hire women. In manufacturing, in particular, women tend to be segmented at the lower end of light manufacturing activities, so it is important for policymakers to take steps to incentivize both horizontal and vertical gender mobility. Also essential are retraining programmes to enable workers to shift between industries when the trading environment or trade policy changes.

3.3 SERVICES

A number of the UNCTAD studies examined the tourism industry in the services sector, which tends to employ women in larger numbers, though

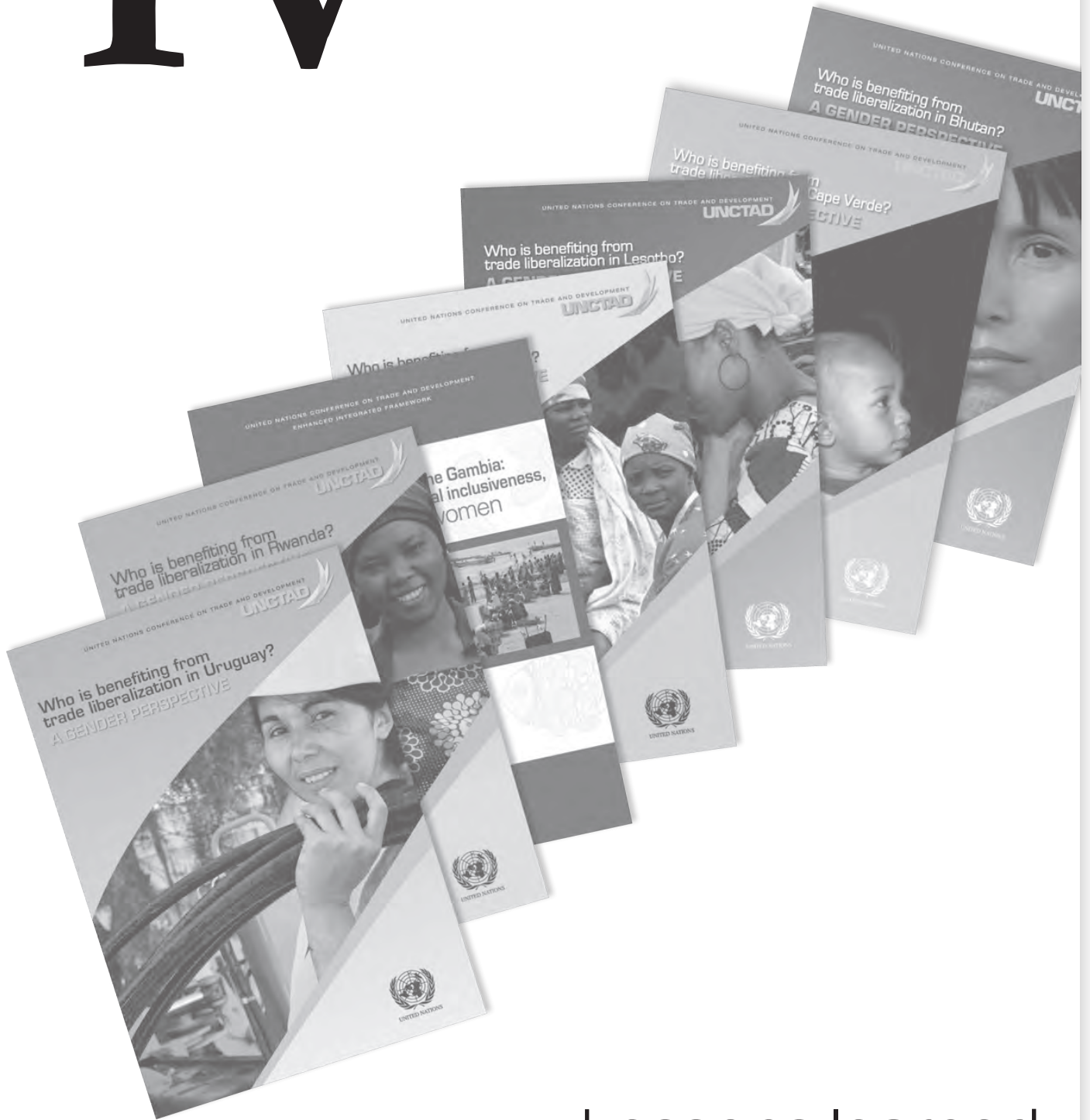
oftentimes their access to better-qualified, formal sector, and higher-paid jobs is limited. Policies need to focus on integrating women into formal employment and promoting their access to training and higher-skilled positions. Community-based tourism and/or ecotourism in particular have the potential to increase women's employment while promoting sustainable practices on the ground. For instance, given Angola's varied wildlife, landscape, and natural reserves it could strategically position itself in the subregion as a high-value ecotourism destination, though a widespread lack of skilled labour and specialized personnel would constitute major challenges. Policies to encourage women's post-primary education and professional skill development, including affirmative action, would facilitate their participation and provide access to higher-level, more stable, and better-paid positions in the tourism industry. In Bhutan, the expansion of community-based tourism and forms of ecotourism could also become an effective catalyst for poverty reduction, promotion of cultural heritage, and environmental protection in rural areas.

Cape Verde's economic growth could benefit from linking tourism with other economic sectors. The promotion of cultural tourism, community-based tourism, business-related tourism, and wellness and health tourism could be relevant in this respect. Community-based and cultural tourism could particularly benefit women in poor rural communities. Tradable sectors with clear export potential, such as tourism, could be promoted using Aid for Trade initiatives, which could finance skill upgrading for women working in the tourism sector. Trade and migration instruments that could be used to ensure that migration benefits Cape Verde include negotiations to facilitate the recognition of professional qualifications relevant to the Cape Verdean diaspora, the establishment of centres to distribute information on migration and employment opportunities in the receiving countries, and the facilitation of remittances flows.

In the services sector, women also make up the bulk of small and informal traders in LDCs such as Rwanda. Gender-specific obstacles faced by informal cross-border traders – namely those trading in legitimately produced goods and services that escape the regulatory framework set up by the Government – need to be addressed. These include limited access to capital, which translates into low levels of start-up capital and small scale; lack of awareness of rights and responsibilities, particularly with respect to border taxes; and harassment by border officials. UNCTAD's Rwanda study recommends streamlining procedures and improving information and transparency at the border, including a one-stop window or fast-track clearance system for informal cross-border traders. Coordinated national policies and effective monitoring mechanisms at the subregional level are needed to ensure coherent implementation of reforms across national borders. If these and other constraints are effectively addressed, the full entrepreneurial potential of female cross-border traders could be unleashed, which in turn would likely promote export competitiveness, trade expansion, and economic growth.

In countries such as Uruguay, on the other hand, most employment opportunities for women are in non-tradable services. Involving Uruguayan women in tradable services activities with higher average wages would represent a viable way to help them benefit from the country's trade liberalization process. The high educational achievements of Uruguayan women should facilitate the process. UNCTAD's (2014c) study of Uruguay recommends overcoming the possible mismatch between the skills required by the dynamic services sectors and the skills that women have developed by raising awareness among girls and young women about the skills and specializations needed and using scholarships, training, and other incentives to develop the professional profiles that are required.

IV



Lessons learned

4. LESSONS LEARNED

This concluding section reflects on some of the overarching themes and issues reported in the studies. These lessons learned might be instructive in thinking not only about gender inequality and trade, but also in framing and finding solutions to problems that seem to occur repeatedly in different contexts.

First, many countries have made significant progress in achieving gender equality goals by signing a number of international conventions on gender equality and translating them into national laws. For instance, although Lesotho is a LDC, it has achieved parity in literacy and education and ranks among the top countries on the World Economic Forum’s Global Gender Gap Index, ahead of several developed countries. Rwanda stands out for its dramatic improvements in women’s reproductive health, particularly the large drop in maternal mortality and gains in the net enrolment ratio in primary education. Cape Verde has enacted strong legislation that defines domestic violence as a public crime that anyone can bring to the attention of public authorities and that the judiciary treats as a matter of urgency and priority. In recognition of the need to level the playing field between men and women, Uruguay passed legislation in 2005 on equality of opportunities, and more recently on maternity leave, sexual harassment in the workplace, violence against women, domestic work, retirement, and quotas in parties’ lists. Both the public and private sectors are introducing some changes in their recruitment and career development policies to comply with gender equality legislation. Because gender inequality is caused and reinforced by intersecting domains of inequality, changes on these multiple fronts are very important to creating enabling conditions for women’s empowerment and must be commended.

There are of course many challenges that remain. First, legal changes unto themselves, as we know, are not sufficient to tackle gender inequality. At times international obligations have not translated into national laws, and at times the institutions that have been put in place to promote gender equality and enhance opportunities for women have been under-staffed, with limited budgets and a lack of political influence. Entrenched gender biases often prevent the translation of de jure equality into equal outcomes on the ground. For instance, in countries

that have a double legal system, women’s access to “civil” law, especially in rural areas, is limited, while de facto customary laws deny them rights such as access to land and inheritance. Clearly, more needs to be done in these critical areas, and governments have shown the commitment and political willingness to take on these challenges.

Second, it emerges from the studies that trade liberalization does not have unambiguously positive effects and that the impact on women is sometimes double-edged. Thus women may simultaneously gain and lose from the development of export sectors: they may get stable wage employment, but they may have low salaries and limited opportunities for skill development. Expansion of the tourism sector provides employment for women, but often such employment is in the lower nodes of the sector. Women may gain as consumers when agricultural tariffs are reduced, but may lose as producers when the prices of those commodities fall. For instance, if tariff liberalization leads to a decline in agricultural prices in Cape Verde, such liberalization would have a significant anti-poor bias. In Bhutan, it matters which products are promoted for export, as higher apple exports would have an anti-poor bias whereas exports of potatoes and oranges would be pro-poor. Specific steps need to be taken to ensure that existing inequalities are not reproduced or exacerbated with shifts in trade policy.

Third, gender considerations have only rarely been taken into account in trade and macroeconomic policy, even though they affect different groups in profoundly different ways based on gender, geographic location, social status, or pertaining to a racial or ethnic minority. “Gender blind” trade and macroeconomic policies will no doubt exacerbate existing gender inequalities instead of solving them. Thus there is a need to look at the discrete impact of trade policy on men and women by conducting both quantitative and qualitative research that simulates the effects of policy changes, surveys affected populations, and uses data, field methods, and resources to disaggregate and analyse outcomes based on gender, income, region, race, etc. These findings can then be used to inform equitable and redistributive policy measures and implement them in a gender-aware manner.

Neither can Governments stop at trade policies alone

– as the country study policy recommendations have shown, trade, industrial, agriculture, labour, infrastructure and social policies need to be coordinated. In addition to this policy coherence in different areas, a comprehensive approach is needed to solve women’s problems. It is necessary to address supply-side constraints, especially those that particularly affect women such as household responsibilities, disproportionate care burdens, and lack of technical skills and training. At the same time, gender biases and norms that create inequalities in terms of opportunities in the first place have to be identified and changed.

A fourth lesson learned from the country case studies, and one which relates to the previous lesson, is that there is widespread segmentation by gender across employment and occupational categories in all the countries studied. Women tend to be concentrated in subsistence agriculture, in industries such as apparel in manufacturing, and in tourism-related industries in the services sector. They also tend to be in occupations that are low-paid and have low value-added rather than in managerial or supervisory positions. Because women are concentrated in a few industries and occupations as compared with men, their wages and earnings tend to be lower than men. Often the activities they are engaged in relate to gender roles and norms that are prescribed within the family and society at large. For example, women are considered better suited for work in hospitality, care work, and light manufacturing.

Unless these entrenched and long-standing patterns of segmentation are comprehensively addressed and women’s participation is increased in different segments of the economy – including cash crops, exports, high-value-added manufacturing, and better qualified employment in services – women’s economic empowerment will remain an elusive goal.

Finally, structural transformation of economies is necessary to shift to higher-productivity activities, although efforts also need to be made to make agriculture itself more productive. Countries like Lesotho have been quite successful in expanding manufacturing activities, but that success has come with new vulnerabilities such as high dependence on preferential tariffs and poor working conditions and wages for women employed in the export-oriented apparel industry. In Uruguay, structural transformation has had ambiguous effects on gender inequality, as women have not benefited from the increasingly export-oriented character of agriculture, while deindustrialisation has hurt women’s employment. Thus the nature of the structural transformation that is occurring is important, and policy efforts need to identify and promote several complementary objectives at the same time, such as ramping up agricultural productivity, diversifying sources of export income, and ensuring that existing inequalities are not reproduced in the process. In all these cases, looking through a “gender lens” remains indispensable.

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